

Employee: Tatiana Sherman, Workforce Project Manager

Supervisor: TZ Waters, Director of Workforce

Date: 12-18-19

Performance Improvement Plan Review

Task: Teamwork

Deficiency: Would often prefer not to collaborate whether with staff or departments.

Corrective Action: It is important we all move ICC forward. Structures are changing but we often had to discuss which department would get credit for a project. There seems to be competition between other staff and departments, which is not always healthy for our division. We all need to work together. When I recently asked Ms. Sherman to help an accountability team, she checked on them, but then got paperwork to review later on her own. The team would have appreciated her being a part of that solution when they were working on it.

Rating by Supervisor (select one)

☐ Meets Expectations ☐ Does Not Meet Expectations ☒ Progress Made towards Meeting Expectations, but PIP Extended Until toward end of May 2020

Comments by Supervisor

Mrs. Sherman has shown some efforts to work with the accountability staff and other department staff, however, her approach came across as unprofessional to some staff.

Based on interactions with other departmental staff, which a few expressed concerns to me about working with Mrs. Sherman. A couple expressed they would be better off not having to work with her; a couple had expressed concerns of retaliatory actions from Mrs. Sherman. One other staff from another department expressed confusion to me about Mrs. Sherman's repeat request on publicity of a company's event which the final decision was communicated and explained to Mrs. Sherman earlier.

Mrs. Sherman had asked if the Director would buy computer-software books for her classes because that was what Mrs. Sherman did. When collaboration with staff to work out a way to share the college resources would be the effective approach which she did not do so. Instead of researching, she suggested purchasing more books which the college does have ample supply and also those books will become outdated soon. The Director had to research with another staff which Mrs. Sherman did not do, to find out the inventory of books for classes and class schedules.

During a staff meeting, I had also asked Mrs. Sherman to work with another department to obtain the data she needed for MEP reporting instead of granting Mrs. Sherman's request to require staff from another department to attend our staff meeting. The issue came up again about obtaining the data for MEP from this department, which she did not do, so I ended up doing so. Mrs. Sherman would not work with the staff in this department to obtain the data she needs as part of her MEP manager's responsibilities.

We all have to work as a team with many moving pieces, most staff will work to perform their job responsibilities in spite of challenges in working with Mrs. Sherman. Nonetheless, Mrs. Sherman's approach to working with others can be improved to enhance efficiency and effectiveness of our team and this division.



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Comments from T. Sherman

Mrs. Waters scheduled a computer class at the same time I had an ongoing computer training class for the public. Her trainer had to borrow books from my trainer 15 minutes prior to the training session. I assisted Mrs. Waters' trainer with locating the books, and asked Mrs. Waters to buy more training materials for these types of classes. Mrs. Waters reprimanded me for not knowing the department inventory for these books.

All MEP interactions come from the MEP data system. All project managers including Mrs. Waters must provide data in the MEP system before accurate data can be reported to the State MEP Center by me. Mrs. Waters incorrectly makes the statement that I refused to collect the data from a different department. Only staff in the workforce department can use salesforce.com (MEP Data program). I do not understand why she is using this as negative feedback since she knows the process.

Employee Signature Tatiana Sherman

Date 12-18-19

Supervisor Signature Bernard Waters

Date 12/18/19

Witness Signature T. Sherman

Date 12/18/19

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000006

Employee: Tatiana Sherman, Workforce Project Manager

Supervisor: TZ Waters, Director of Workforce

Date: 12/18/19

Performance Improvement Plan Review

Task: Preparing quotes for companies for workforce training

Deficiency: Quotes not worked on collaboratively, shared in a timely manner, not always accurate or detailed.

Corrective Action: Quotes should be reviewed by director and given to director in timely manner for proper review before company. Project manager should pull all past quotes/invoices for company and then compare to new prices. The final price quoted to company will be determined by director and/or dean and project manager collaboratively taking into account the new updated prices, past price history for company and quantity of training requested. As discussed in person, quotes should be thorough. Anyone in company or school should be able to read the quote and understand the full scope of project. To accomplish all of this, it must be explained to company that it could take a few days. A reasonable timeline is expected to accomplish getting the quote correct.

Rating by Supervisor (select one)

☐ Meets Expectations ☒ Does Not Meet Expectations ☐ Progress Made towards Meeting Expectations, but PIP Extended Until toward end of May 2020

Comments by Supervisor

While Mrs. Sherman has made some efforts, she does not always provide complete information to Director and Dean when developing quotes and there were instances where corrections to content of the quotes had to be made.

There are instances where quotes contained typographical errors; adequate information was not presented to develop the quote; the scope of work/training content contained conflicting information. In another instance, two different quotes were created for the same training and presented for Director's/Dean's approval.

Expectations on the quality of documents sent to entities outside the college should be professional, i.e. the content should be accurate, understandable, and checked for typo errors or mistakes.

Comments from T. Sherman

Mrs. Waters micromanages my every step. She capitalizes on every little mistake I make such as using a semicolon vs colon, Belden Center vs ICC Belden Center, Excel Computer Skills Class vs Microsoft Excel Computer Skills. I used the same terminology before for writing quotes in FY'19, and she did not correct me for the same verbiage then. For FY20, I have created 17 quotes, and Mrs. Waters is not satisfied with four of my quotes. A trainer and not a project manager provides the scope of work for a training program. I present all quotes to the team to work on collaboratively.

I only receive a negative feedback in terms of reprimand and criticism in writing such as an email. It has escalated in the last two months.

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Employee Signature Taliana Sherman

Date 12-18-19

Supervisor Signature Bernardo

Date 12/18/19

Witness Signature T. Soto

Date 12/18/19

ICC-Sherman
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Employee: Tatiana Sherman, Workforce Project Manager

Supervisor: TZ Waters, Director of Workforce

Date: 12/18/19

Performance Improvement Plan Review

Task: Managing of projects

Deficiency: Proper tracking of documentation and lateness of checks to companies

Corrective Action: Project manager should be pro-active in all things and track emails, quotes, invoices, checks and communication with company representatives. A folder for each company should be created in outlook email. All communication with company representatives should be kept there. A file for each company should be created on the x: drive and any documentation (quote, invoice, please pay, etc.) should be kept there for at least 5 years. Also track company interactions and visits in outlook. Also track surveys and job placements for student pathways.

Project manager should be pro-active in managing the timeline of check reimbursement. Project manager should keep a timeline of when paperwork is received, number and type of classes, approximate amount and record all data. Project manager should set a reminder in outlook calendar about each batch of company paperwork.

- At 60 day mark, project manager should look into reimbursement paperwork and work collaboratively with accountability and financial specialist to prioritize paperwork and try to cut a check within 30 days to company.
- If there is some issue why that can't happen, please involve director and/or Dean so we can proactively work together to solve resolution and collaboratively draft a response to the company about the delay and work on getting check cut in a timely manner.

Lastly, Project manager should order books and supplies for in-house and adjunct trainers. Project manager should provide complete documentation for each class that they ask trainers to teach for company or individuals prior to class.

Rating by Supervisor (select one)

☐ Meets Expectations ☐ Does Not Meet Expectations ☒ Progress Made towards Meeting Expectations, but PIP Extended Until toward end of May 2020

Comments by Supervisor

Fiscal year 2020 has a delayed start due to WESS closure until mid-September 2019. Mrs. Sherman has started to keep track of a few companies' paperwork for reimbursement on her Outlook calendar, reminders were not set for tracking payments/invoices. The Project data tracking sheets were not follow through in several instances with signatures, dates, and approximate total reimbursement dollars. Data Specialist saved documents like billing and memos to the company folders.

Mrs. Sherman has started to work with one trainer recently to determine the books he needed. She had also wrote up a few requisitions. Project manager has not ordered books for the trainer, she gave the purchase requisition to data specialist to order. There is a change in the departmental procedure, the books will be ordered by Project manager. Procedure has been reviewed on November 25 staff meeting.

More time will be needed for the corrective action on reimbursement process due to the delayed opening (mid-late September 2019) of MCCB WESS.

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Comments from T. Sherman

Clarifications needed:

All updates for payments/invoices are part of the Data Specialist's responsibilities who is assigned as a point of contact between workforce department and business office. This responsibility is not listed under project managers' duties in our departmental guidebook. Is this my deficiency?

Clarification needed for the second paragraph from Comments from Supervisor.

I followed the process of issuing purchase orders as it was written in the handbook for the department until November 25. Mrs. Waters reprimanded me to another staff member by saying "Tatiana did not follow the process". After Mrs. Waters reread the policies and realized that she was incorrect, she verbally announced a change in the manual to meet her new requirements. This change has not been presented to the team in writing as yet.

Employee Signature Tatiana Sherman

Date 12-18-19

Supervisor Signature Bernard Waters

Date 12/18/19

Witness Signature T. J. Santos

Date 12/18/19

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Employee: Tatiana Sherman, Workforce Project Manager

Supervisor: TZ Waters, Director of Workforce

Date: 12/18/19

Performance Improvement Plan Review

Task: Clear and effective communication with team

Deficiency: Often relies on email when a conversation could be more clear and effective.

Corrective Action: Any major changes should be communicated in person and then followed up by email to document changes, such as with entrepreneurship program stated in evaluation. Those kind of changes should be shared and discussed with supervisors before sharing with external entities.

Quotes should be worked on collaboratively with Director as stated above.

Work within team to solve problems, not just via email or on your own. Most of these problems are complex with multiple moving parts where paperwork might be on someone else's desk. It can be much easier to go into a colleague's office or huddle everyone up to solve a problem. Email should be used to summarize and clarify and document when needed.

Please work closely with accountability team and director. Help them input classes and participants into pro-assessment or be willing to do anything as needed to move the project along. Help them total classes and correct for errors while they are doing it, especially if we are beyond 90 days on a reimbursement. Do not wait for someone to complete a task before you are part of the process.

Please attend all assigned committees, division and college events, and any event assigned as other duties.

Rating by Supervisor (select one)

☐ Meets Expectations ☒ Does Not Meet Expectations ☐ Progress Made towards Meeting Expectations, but PIP Extended Until toward end of May 2020

Comments by Supervisor

While Mrs. Sherman has shown some efforts in working closely with Accountability team, Accountability team should not be asked to be the primary in making decisions to determine whether paperwork meets guidelines for completeness and accuracy. She deferred to other team members to make decisions on the company's paperwork. Reviewing company paperwork first hand for accuracy and completeness, and calculating the reimbursements are core responsibilities of a project manager. There were instances of inaccuracies on calculations on the paperwork. Calculations on total dollar reimbursements were not done consistently and documented on Project Tracking Sheet. The Director has communicated a few times on the need to follow the process steps on the Project Tracking Sheet.

Communications when developing quotes can be improved with more information provided. In some cases, Mrs. Sherman's communication with other ICC staff and companies have caused some confusions. Mrs. Sherman's communication pattern often results in more questions, resulting in back and forth on email communications, when more information had to be asked of her to make decisions.

Comments from T. Sherman

Mrs. Waters has incorrectly made statements about me referring to the accountability staff for making decisions on the amount of training hours to be reimbursed. All project managers check documentation and assign training hours prior to any other staff member receiving the paperwork. Mrs. Waters made several conflicting decisions about the amounts to be calculated for training hours eligible for reimbursement. Several staff members expressed their disagreements with her in team meetings. Mrs. Waters allowed a company she is working with to bypass her recommendations she issued regarding my companies. A staff member addressed this decision with her by saying "how can a company with 80 people receive the same amount in reimbursements as a company with 2500, and that is why this company is throwing red flags to auditors". The team suggested to Mrs. Waters that all companies should receive equal treatment.

Another staff member expressed to me their concern that "ICC is paying for companies' payrolls vs reimbursing for training hours". When I brought it to Mrs. Waters' attention, she instructed me to never repeat this. Mrs. Waters admitted in front of the team that it is very hard for her to make decisions on what is eligible for reimbursements.

In summary, the animosity towards me by my administrators in the WF department is rooted in their fundamental lack of knowledge regarding state policies and project management. I had to bring up to my administrators the fact that ICC has the technical capability to track the correct training hours for each student/participant. They were completely unaware of this.

Mrs. Waters was dissatisfied with one of my projects since I did not include copies of invoices in the file for the MCCB auditors. I advised Mrs. Waters to only use original invoices for all reimbursements since it is required in the state workforce policies and were located in the appropriate department within the Belden Center. MCCB auditors do not accept copies for state reimbursements. MCCB auditors labeled every file that did not have originals in it as "pay back" during their site visit in November 2019.

Dean Lowder and Mrs. Waters met with one of my companies regarding training documentation and recommendations MCCB auditors made during their visit in November 2019. They did not include me in this conversation, yet, Mrs. Waters suggests I am the primary person to make decisions to keep documentation compliant with MCCB standards. I had to collect my information from my company contact about recommendations from the auditors. Mrs. Waters briefed me on the conversation, but the message I received from the company was different from hers.

Last week Dean Lowder invited me to a company visit with one of my major customers on Friday afternoon while the meeting was scheduled at 9.30 a.m. the following Monday, even though this meeting was scheduled in advance between ICC staff and Dr. Allen.

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Mrs. Waters never communicates with me directly about any of my projects and classes. Instead, she writes information or a question on sticky notes or email. Staff members expressed to me how uncomfortable they are at being intermediaries to communicate with me since Mrs. Waters tells them things to tell me.

Several staff members are concerned about retaliation from Mrs. Waters for being friendly with me. They expressed to me that they received negative feedback from talking to me on a casual basis or inviting me to work related events.

Mrs. Waters has expressed negative comments about me to several individuals inside and outside of ICC.

Mrs. Waters reprimanded me three times about an annual budget for MEP. I was assigned this role a year ago and have followed instructions explicitly from the former MEP Director and the current MEP State Coordinator. Mrs. Waters reprimanded me twice in her emails on a recent Sunday evening. The last email came at 10:21 p.m. I asked Mrs. Waters to meet with me the next day so I could explain the salaries, which were already approved by the MEP State Coordinator. She did schedule a meeting with me on Monday and confirmed she saw the reason I presented those numbers the way I did. She preferred to call the State Coordinator. I asked her to include me in the conversation with the MEP Coordinator who confirmed I used the salaries correctly. After Mrs. Waters stayed on the phone for a half an hour with the MEP Coordinator, and questioned her repeatedly, the MEP Coordinator said, "Tatiana's salaries are correct, but you can do them the way you want".

Mrs. Waters never has a private personnel meeting with me where her expectations are presented in a collegial matter. Recently, one of my colleagues became very emotional in my office due to the way Mrs. Waters questioned him/her concerning me. This staff member expressed to me how he/she was concerned about me being attacked by Mrs. Waters. The person apologized to me for Mrs. Waters. Another staff member came to me and explained that he/she had to step up and say, "Tatiana did her part" regarding the incident that brought verbal criticism of me. I never responded to Mrs. Waters emails regarding this incident. Other staff members responded for me.

Employee Signature Tatiana Sherman

Date 12-18-19

Supervisor Signature [Signature]

Date 12/18/19

Witness Signature [Signature]

Date 12/18/19

Employee: Tatiana Sherman, Workforce Project Manager

Supervisor: TZ Waters, Director of Workforce

Date: 12/18/19

Performance Improvement Plan Review

Task: Feedback

Deficiency: You have not been receptive to feedback

Corrective Action: Feedback given is for employee growth and to help the department move forward more effectively. It is not meant as a personal attack, but often is received that way. Also please do not deflect blame onto other people. If issues or deficiencies arise with a team member, inform the Director at that time. Try to think of ways you can help move the issue forward in a positive direction.

Rating by Supervisor (select one)

☐ Meets Expectations ☒ Does Not Meet Expectations ☐ Progress Made towards Meeting Expectations, but PIP Extended Until toward end of May 2020

Comments by Supervisor

Mrs. Sherman has not received feedback well, and deflects the blame on others. When concerns were pointed out, while she acknowledged the issues, she did not take responsibility for the issues, often she countered with how others involved in the process were to be blamed as well. A company representative was confused about a communication with Ms. Sherman on paperwork, and I briefed Ms. Sherman about the confusion. she did not take responsibility. I pointed out the importance of following the process on tracking sheet on a few documents that Ms. Sherman did not sign off, she pointed out what other team members were not doing.

Mrs. Sherman exhibits a pattern of while acknowledging the issues, yet counters with her justifications and diverts blame on others.

Comments from T. Sherman

I only receive negative feedback from Mrs. Waters. Individuals outside and inside of ICC warned me that I am "being pushed out". Recently, my Dean referred to me in a very negative term to staff. This is damaging to my reputation throughout the college.

I was told by staff "Dean and Mrs. Waters" were trying to get rid of you". It has been discussed on all campuses about the letter I wrote regarding improprieties within the workforce department.

Employee Signature Tatiana Sherman

Date 12-18-19

Supervisor Signature TZ Waters

Date 12/18/19

Witness Signature T. Waters

Date 12/18/19

ICC-Sherman
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ICC-Sherman
000014

Employee: Tatiana Sherman, Workforce Project Manager

Supervisor: TZ Waters, Director of Workforce

Date: 12/18/19

Performance Improvement Plan Review

Task: Take direction from Director/Dean

Deficiency: Often questions directives from Dean/Director and does not accept direction without a prolonged push-back in different forms.

Corrective Action: It is ok to question, that is needed in a healthy work environment and Ms. Sherman has made some good points, but there is a limit to the push back that can result in delays and breakdowns between team members and external partners. Director/Dean are sometimes at meetings or in conversations that you are not. Under no circumstance should an external partner be called to counter the directive given as stated example in evaluation. Under no circumstance should employee go to other employees or into their files to try find information that would invalidate supervisor's directive.

Rating by Supervisor (select one)

☐ Meets Expectations ☒ Does Not Meet Expectations ☐ Progress Made towards Meeting Expectations, but PIP Extended Until toward end of May 2020

Comments by Supervisor

Mrs. Sherman has not accepted directives from the Director without much dissent and she undermines them. Directives were not always followed. I spent more time than usual asking for information, reviewing calculations, quotes and documents to external entities.

Toward the end of FY19, companies had turned in more paperwork for Mrs. Sherman. Mrs. Sherman had been instructed by the Dean and Director to let companies know there was no guarantee paperwork would be processed for reimbursement and to work with Accountability specialist to see if there was money. Mrs. Sherman came in my office later that day, and while I was on the phone, dropped off a stack of paperwork on my desk and started to walk off. I stopped my phone conversation and asked her what they were. She said paperwork from 4 companies, and I explained again for her to work with Accountability specialist.

Directive was given by the Dean for Mrs. Sherman, the Director and staff from another department to meet on a new process and project. Mrs. Sherman being the project manager did not call for a meeting, but told the Director she had already met with one of the staff and told the Director she could meet with the staff herself. The Director had to call the meeting for all to meet on the new process/project.

The Director had to explain again the MOA language on reimbursing for a company on a new process. Mrs. Sherman was given the opportunity to review and provide feedback on the MOA for this new project prior to submittal.

Mrs. Sherman asked if a purchase requisition can be approved and the budget number to use on an item that costs a few thousand dollars, without providing complete information. The Director had to ask again for the information from Mrs. Sherman.

Based on my interactions with Mrs. Sherman, she shows a pattern of often questioning directions from me and not providing complete information when asked.

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Comments from T. Sherman

I need clarification regarding the start date of this review from Mrs. Waters.

The recommendation I received back in October from Dean Lowder was for Mrs. Waters to start working with me beginning October 2019. What is the start date for this evaluation?

Mrs. Waters incorrectly makes a statement about me asking her to clarify the language in the MOA about reimbursement for a company on a new process. I read the MOA and understood it. I gave my recommendation on project execution to Mrs. Waters. She did not take my recommendation and I did not question her direction, knowing her decision did not follow the MOA, that would have been in the company's best interest. Her decision affects the company's eligibility for reimbursement for this semester. It also puts me in position of working during upcoming Christmas break.

Mrs. Waters expressed displeasure with me when I notified her that we could not reimburse twice per same participant/student for the same day and time for training for a new company. She finally changed her decision when another staff member agreed with my assessment and disagreed with Mrs. Waters. Per Mrs. Waters' instruction, the company was already notified that they were receiving that second reimbursement. I had to call the company and apologize.

I need clarification about the purchase requisition Mrs. Waters is referring to in her comments. I followed the standard process for issuing a purchase requisition for a company for a new class. The company ordered books for participants for a class, signed the quote and I wrote a purchase requisition for training materials. This has been the standard procedure for the last 16 years. Mrs. Waters defined it as "not enough information for making a purchase".

I am hesitant to ask Mrs. Waters a question. In November of 2019, I received several comments from ICC staff that "they are trying so hard to get rid of you and it is so bad, I even heard about it from a different campus".

Mrs. Waters is never pleasant around me. I asked her this week in person why she has to be negative towards me at all times using examples from her emails. I asked her to seek information from me first-hand before she demonstrates her displeasure.

Employee Signature

Talisha Sherman

Date

12-18-19

Supervisor Signature

Bernadette

Date

12/18/19

Witness Signature

T. Sherman

Date

12/18/19

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